

Registering an Authorized User (Proxy)

If an authorized user (proxy) wants access to a patient's portal account, complete the following steps to send their invitation:

1. Locate the HealthLife registration in the conversation launcher.
2. Find the patient for whom the authorized user wants to have account access.

First Name: HEALTHLIFE DO N	Middle Name:	Last Name: ZZTEST	Birth Date: 02/18/1980	Sex: Male											
Birth Sex: Male															
Invite Status: Sent	Online Identity Link Status: Active	Error Reason:													
Email Address:	* Access Offered:	Send Invite:	Challenge Question:	Challenge Answer:											
Person Relationship Organizer:															
SSN	MRN	Sex	Birth Date	Last Name	First Name	Street Address	Street Address 2	Street Address 3	Street Address 4	City	Zipcode	Country	County	State	Home Phone Number
Relationship Type		Relationship to Person		Person's Relationship to											

3. Search for the authorized user in the Person Relationship Organizer by clicking its button on the toolbar.
 - If the authorized user exists, confirm his or her demographic information.
 - If the authorized user does not exist, add the user to the electronic health record (EHR).
4. Capture the following information for the authorized user:
TIP: Stay in the Person Relationship Organizer.
 - a. You must select **Authorized User** for the Relationship Type.



Search for Relation...							
Relationship Type: Authorized Representative	First Name: Health*	Last Name: zztest	Birth Date: 2/18/1980	* Sex: Male	* Email Address:	* Send Invite:	* Challenge Question:
* Challenge Answer:	Online Identity Link Status:	Invite Status:	Error Reason:				

- b. Document the Challenge Question and Answer that patient will use later to complete the registration process.
- c. Enter the email address.
- d. Select **Yes** from the Send Invite list.
- e. Ensure **Yes** is selected from the Access Offered list.
- f. After you have documented the necessary information, click **OK** and close the window.

An invitation email will be sent to the authorized user's documented email address with instructions about how to complete the registration process. The authorized user will access the link in their invitation email and enter the challenge question and answer. After the process is complete, the authorized user will be prompted to create an account and log in.

Getting Help

If you experience an issue that requires support, please ask your manager.



Patient Portal Registration

Clinicians &
Ancillary Staff

Patient Portal Overview

The patient portal provides a way for patients to connect to a direct view of their electronic health record. This is done using a secure website that provides convenient 24-hour access. Patients can access the patient portal to exchange messages with providers, view, request and schedule appointments, request medication refills and renewals, and view lab results and other components of their health record.

Additionally, patients can view, download, and transmit their Visit Care Summaries (CCD). In doing so, clinical call volume may decrease while empowering patients to take greater control over the management of their own health on a day-to-day basis.

All staff and clinicians should be comfortable asking patients if they want access to the patient portal. This job aid provides steps for sending invitations to patients.

Registering Patients

If the patient is not a portal user, you are responsible for providing him or her with a flyer and asking whether he or she would like to join the patient portal or other additional, related applications offered by your organization.

If a patient has not been invited to the patient portal, complete the following steps to invite the patient ad hoc using the HealtheLife registration in the conversation launcher or the patient portal registration:

1. Confirm patient's name, medical record number (MRN) and date of birth (DOB).
2. Enter the following information:
 - Email Address (double check accuracy)
 - Access Offered (select **Yes** or **Declined** to attest for meaningful use)
 - Challenge Question
 - Challenge Answer
3. Click **Send Invite** to generate and send the invitation.
4. Click **OK** and close invitation.

An invitation email will be sent to the patient's documented email address with instructions on how to complete the registration process for the patient portal.

The patient will access the link from his or her invitation email, enter his or her date of birth, and answer the security question. The patient will then be prompted to create an account and proceed to log into the portal.

To get connected with Hamilton Health Care System, just follow these easy steps:

1. Access this link: *Accept Invitation to Hamilton Health Care System*
2. Follow the steps outlined on the page.
3. Don't forget to complete this process soon because this email invitation will expire after 90 days. We will send you a reminder before it expires. However, if you forget, just contact Hamilton to receive a new email invitation.

After you're connected, visit <https://hamiltonhealth.iqhealth.com/> to continue interacting with Hamilton.

NOTE: If a patient has trouble logging into the patient portal, contact your manager or call 877-621-8014.

If the Patient Does Not Want to Register

1. Select **Declined** from the Access Offered list. (If the Patient is not able to answer, select **No** from the Access Offered list.)
2. Continue to educate and discuss the features and benefits of the patient portal.

Identifying Users

To determine whether a patient has enrolled in the patient portal, view the banner in the patient's chart. The IQHealth or Portal status is displayed as **Yes** or **No**.

Portal: Yes